COUNTER TOOLS
ADVANCING PLACE-BASED PUBLIC HEALTH

# COUNTER STORE AUDIT CENTER

## Training Manual

# Table of Contents

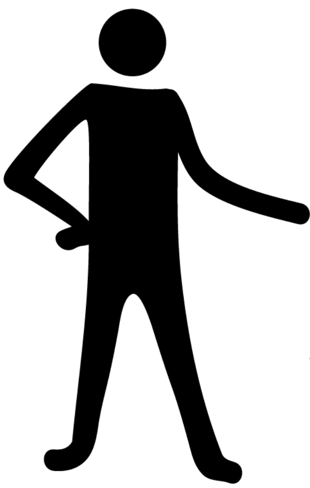


COUNTER TOOLS

# Introduction

The Counter Tobacco Store Audit Center is a comprehensive, paperless solution for planning and conducting data collection campaigns in the retail environment. It integrates team and campaign management, mobile data collection, the capture and storage of photos, and data reporting into an easy to use, web-based system.

## *There are two roles in the Store Audit Center:*



### 1. COORDINATOR

A. Sets up a team
B. Enters or imports store information
C. Builds a customized audit form
D. Assigns stores to team members
E. Sends audit invites to team members
F. Manages audit data and generates reports

### 2. TEAM MEMBERS

A. Receive store audit invitation emails
B. Audit the assigned stores either on paper or using an Internet-enabled mobile device

***Here are the six basic steps to using the Store Audit Center:***

## STEP 1: CREATE A TEAM

The coordinator gives their team a name and location, and then adds the names and emails for the team members.

## STEP 2: ADD STORES

The coordinator enters or imports names and addresses of stores to audit. Once entered, stores are conveniently displayed on a Google map.

## STEP 3: BUILD AN AUDIT FORM

The coordinator builds a customized audit form for the team to use in the field, using premade modules focusing on a variety of aspects of the store environment.

## STEP 4: SET UP A CAMPAIGN

The coordinator creates a campaign, which brings together team members, stores, and an audit form into a focused data collection effort. Team members can be assigned specific stores to audit.

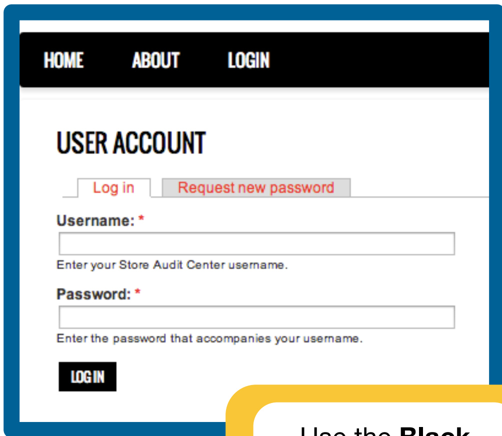
## STEP 5: COLLECT DATA

The coordinator sends out an invitation email to team members, informing them which stores they've been assigned to audit. A team member can then either download a printable form or perform the audit on a mobile device. Team members complete the audit form at each location and the data is automatically saved by the system when the form is submitted. Photos may also be taken and uploaded using the audit form.

## STEP 6: GET A REPORT

Data from a particular campaign or from all audits done using a given audit form can then be viewed or downloaded by the coordinator as graphical charts or a spreadsheet.

# Getting Started




Go to http://audit.countertobacco.org and click **Login** to enter your assigned username and password. On the Login page, you'll also see tabs that allow you to request a new password if you've forgotten your password or would like to change it.

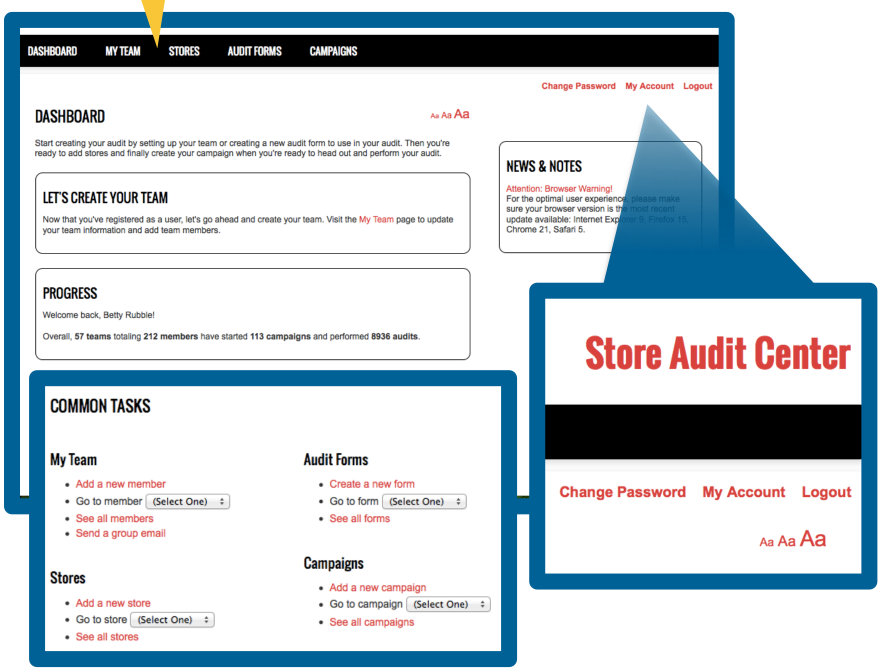
Use the **Black Menu Bar** to navigate the site

TIP

For an optimal experience, please use the most recent version of your browser: Internet Explorer 9+, Firefox 15+, Chrome 21+ or Safari 5+

## *Dashboard*

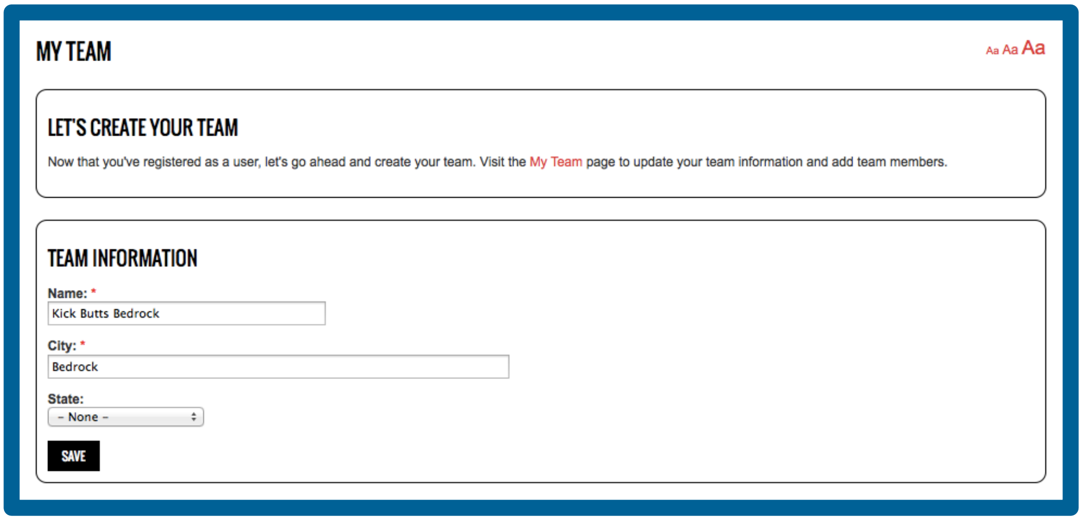
The **Dashboard** is your homepage. If you get lost or confused, you can always return to your dashboard and start again from there. Your dashboard provides statistics on the number of campaigns created and audits performed by your team as well as by *all* Store Audit Center users. It also offers quick links to **Common Tasks** such as adding a team member or selecting a campaign to view.



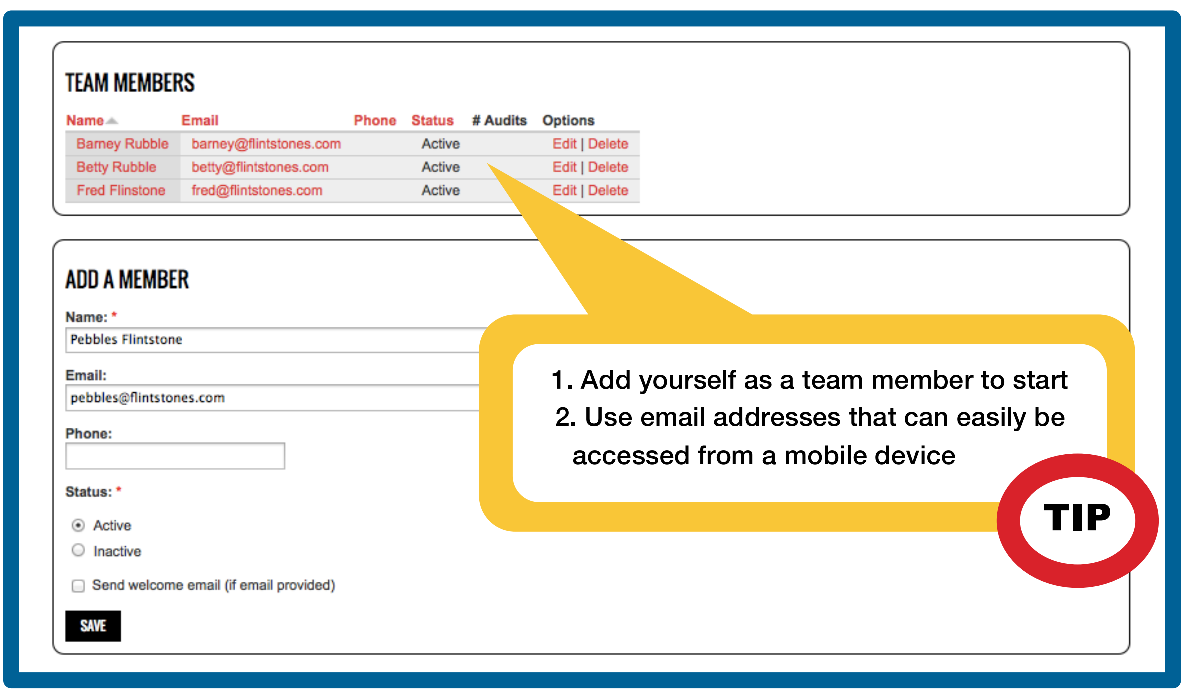

On the right side of each page on the Store Audit Center, you'll see links for **changing your password, viewing your account details,** and **logging out**. In addition, you'll see a font size control, which allows you to make the page text larger or smaller by clicking the **A icons**.

# Step #1: Create A Team

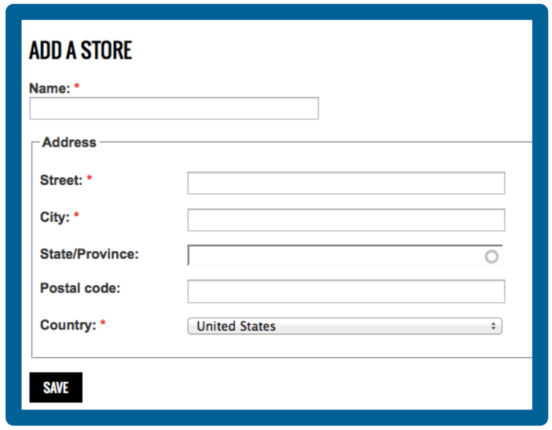
The first step in using the Store Audit Center (before you can do anything else) is to set up your team. Click on **My Team** in the black menu bar to get to the My Team page. Enter a team name, city, and state into the **Team Information** section to set up your team.




Add members to your team by entering their information into the **Add A Member** section and decide whether you want them to be **Active** or **Inactive** – if they're Inactive, they won't get emails from the Store Audit Center. You can also use the **Email My Team** section to contact your entire team at once.



# Step #2: Add Stores

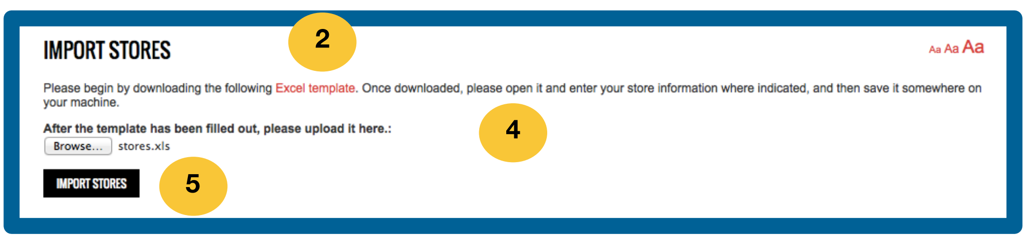



Next, using the black menu bar, go to the **Stores** page to add the location of the stores you want your team to audit. Stores can be added one at a time using the **Add a Store** section. Simply type the name of the store and the complete address and save the store to the list. Or you can batch upload a list of stores.

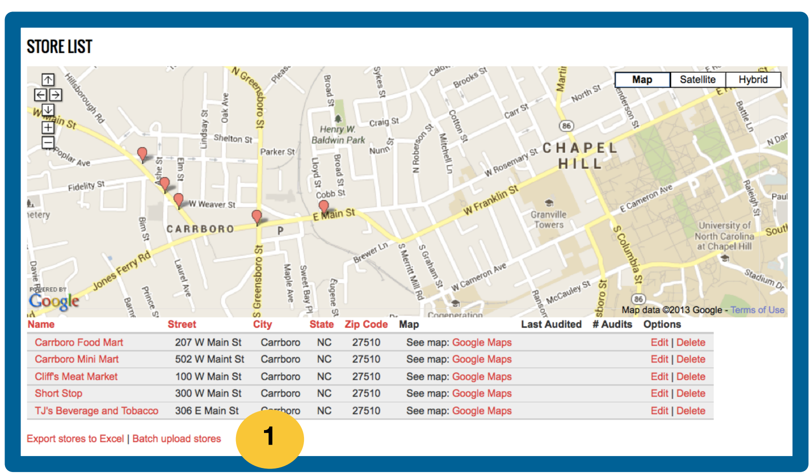
***To upload a list of stores:***

1. Click the **Batch upload stores** link in the **Store List** section
2. Click the **Excel template** link on the **Import Stores** page to download the template
3. *In Excel*: Paste your list of store names and addresses into the template; make sure that the pasted information matches the columns in the template and save it as a .xls file
4. On the **Import Stores** page, click the **Choose File** or **Browse** button to locate your spreadsheet
5. Click the **Import Stores** button

**TIP** In order to upload, save your spreadsheet as an Excel 97-2004 file (.xls)




After entering or uploading your stores, they will show up on a Google map. The complete list of stores can be downloaded as a spreadsheet by clicking on the **Export stores to Excel** link at the bottom left corner of the **Store List** section.

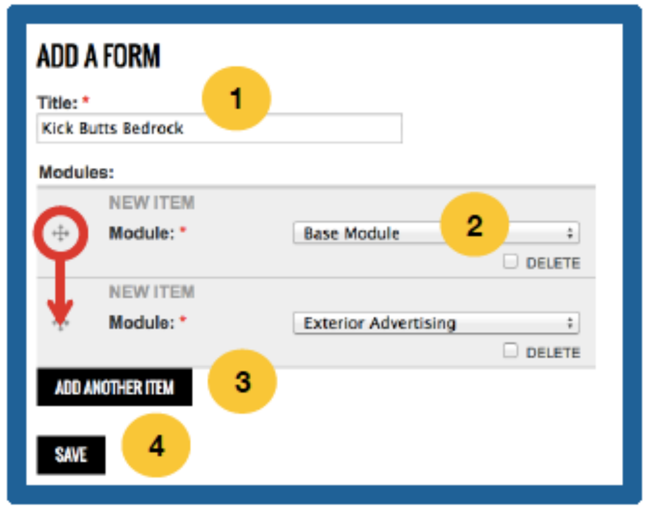


# Step #3: Build An Audit Form

Once you've added stores, go to the **Audit Forms** page in the black menu bar where you'll create your own store audit form. Each audit form is made up of premade modules that are groups of questions tailored by Counter Tools for specific clients or topic areas.

***Adding a new form:***

1. Under **Add a Form**, give the form a name
2. Select a module from the drop-down menu
3. Click **Add Another Item** to add another module (Be sure to include the required *Base Module* at the end of your form)
4. Click **Save** when you are finished

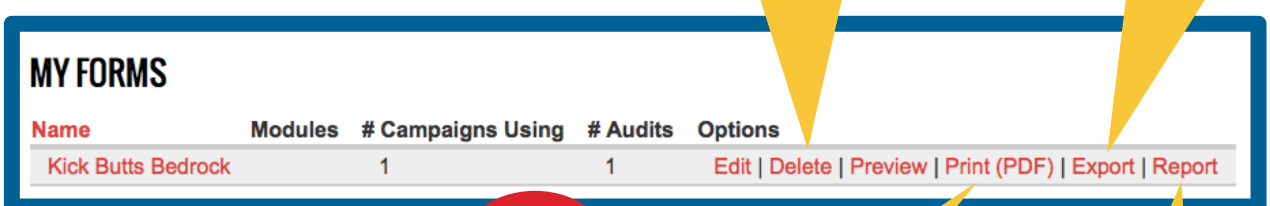



You can reorder the modules by clicking the cross icon next to a module and dragging it to a different location.

Once you've created your audit form, it will appear in the **My Forms** section of the Audit Forms page. From there you can:

**Edit, Delete** or **Preview** the form on your browser

**Export** an Excel spreadsheet of all the data collected using that audit form


MY FORMS

| Name | Modules | # Campaigns Using | # Audits | Options |
|---|---|---|---|---|
| Kick Butts Bedrock | | 1 | 1 | Edit \| Delete \| Preview \| Print (PDF) \| Export \| Report |

**TIP**

Spreadsheets and reports generated from the Audit Forms page will display aggregated data collected by every Store Audit Center user who utilized that audit form in a campaign

Get a PDF version of the form using **Print**

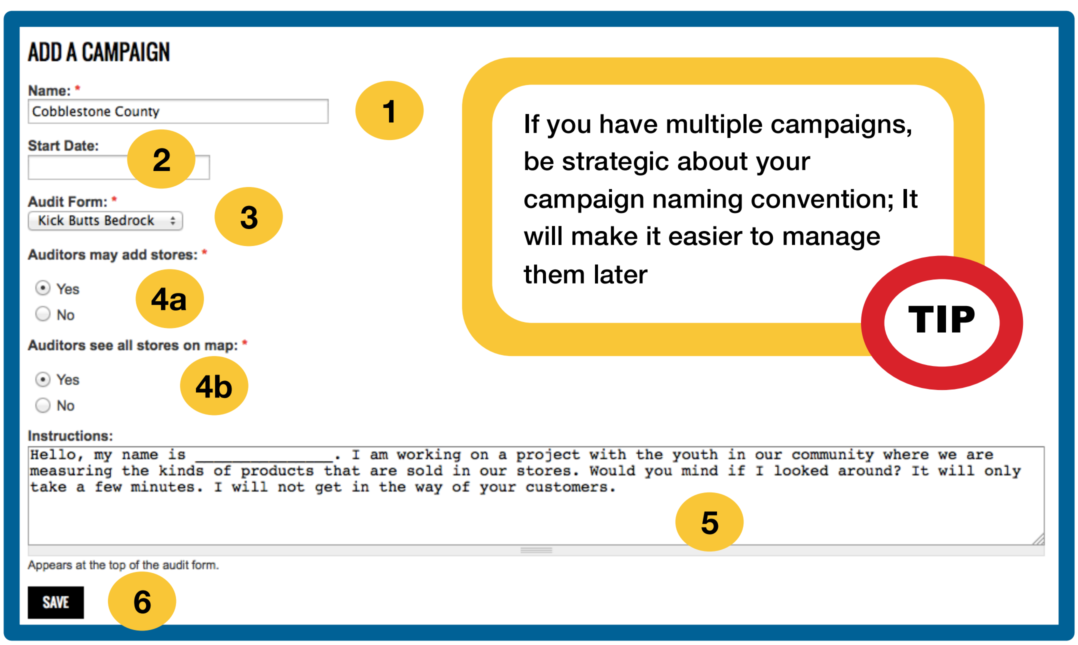
Get a graphical **Report** of the data

# Step #4: Set Up a Campaign

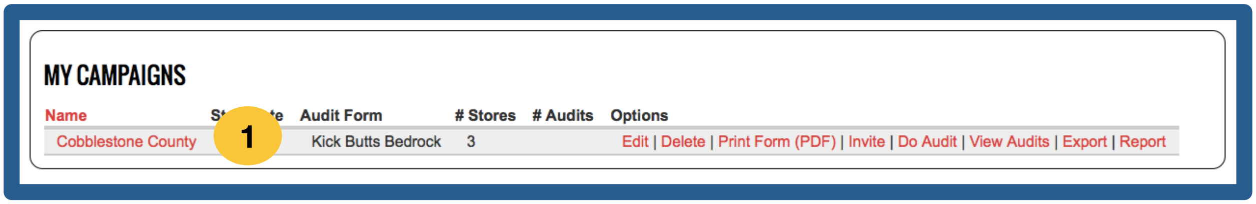
The fourth step in coordinating store audits is creating a Campaign. Go to the **Campaigns** page using the black menu bar. Here you will create a campaign, which brings together team members, stores, and an audit form into a focused data collection effort. Campaigns are often organized around a particular geographic area (e.g., county or city) or data collection period.

***Creating a Campaign:***

1. Select a name for your campaign under the **Add a Campaign** section
2. Enter a start date if you have one
3. Choose the audit form you want to use for the campaign
4. Choose whether or not team members may add stores or see all stores on map
    a. **Team Members may add stores** lets you decide whether team members can add and audit new stores while in the field
    b. **Team Members see all stores on map** controls whether team members can see only the stores they've been assigned to audit, or all the stores in the campaign
5. Enter instructions for your team members if desired – these will show up at the top of the form every time a team member performs an audit.
6. Click **Save** when you are finished

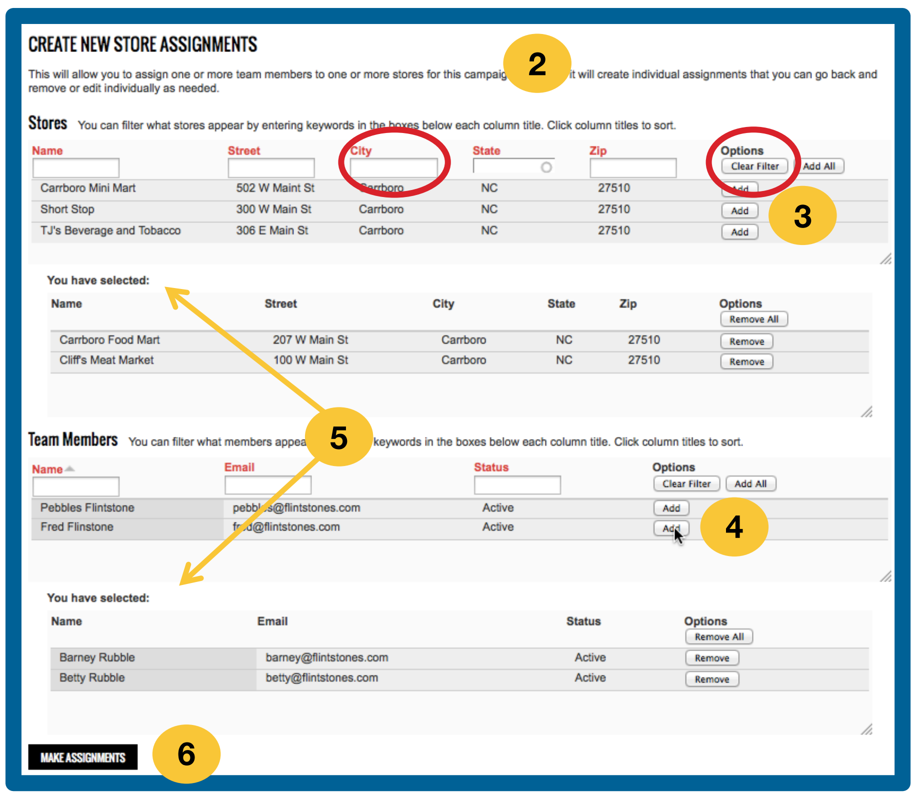


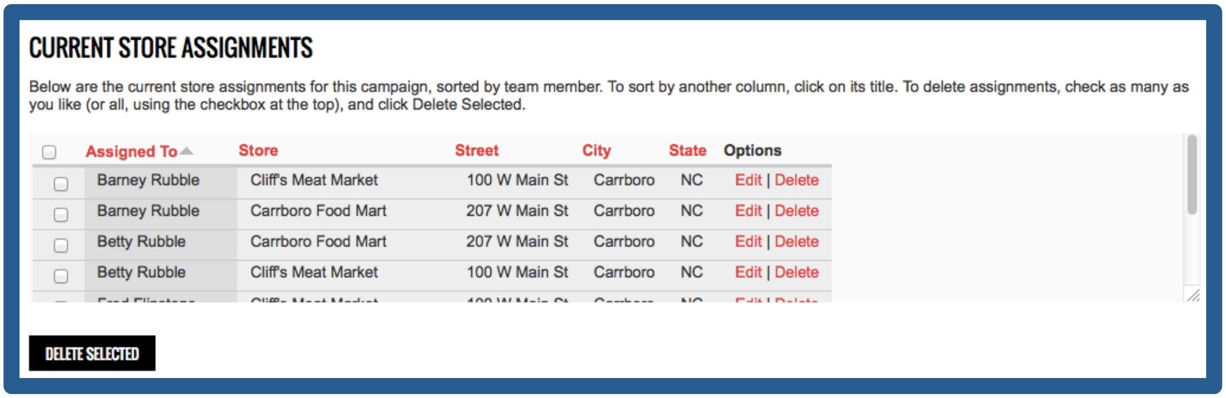
***Assigning Stores to Team Members:***




1. Click on the name of the campaign in the **My Campaigns** section; this will take you to the **Store Assignments** page
2. Go to the **Create New Store Assignments** section
3. Add one or more stores from the **Stores** sub-section
    a. You can click on the **Add** button to the right, or the **Add All** button
4. Add one or more team members in the **Team Members** sub-section
    a. You can click on the **Add** button to the right, or the **Add All** button
5. The stores and team members you've added will move down into a **You have selected** area; Verify your selections before creating the assignments
6. Click **Make Assignments** to add selections to **Current Store Assignments**

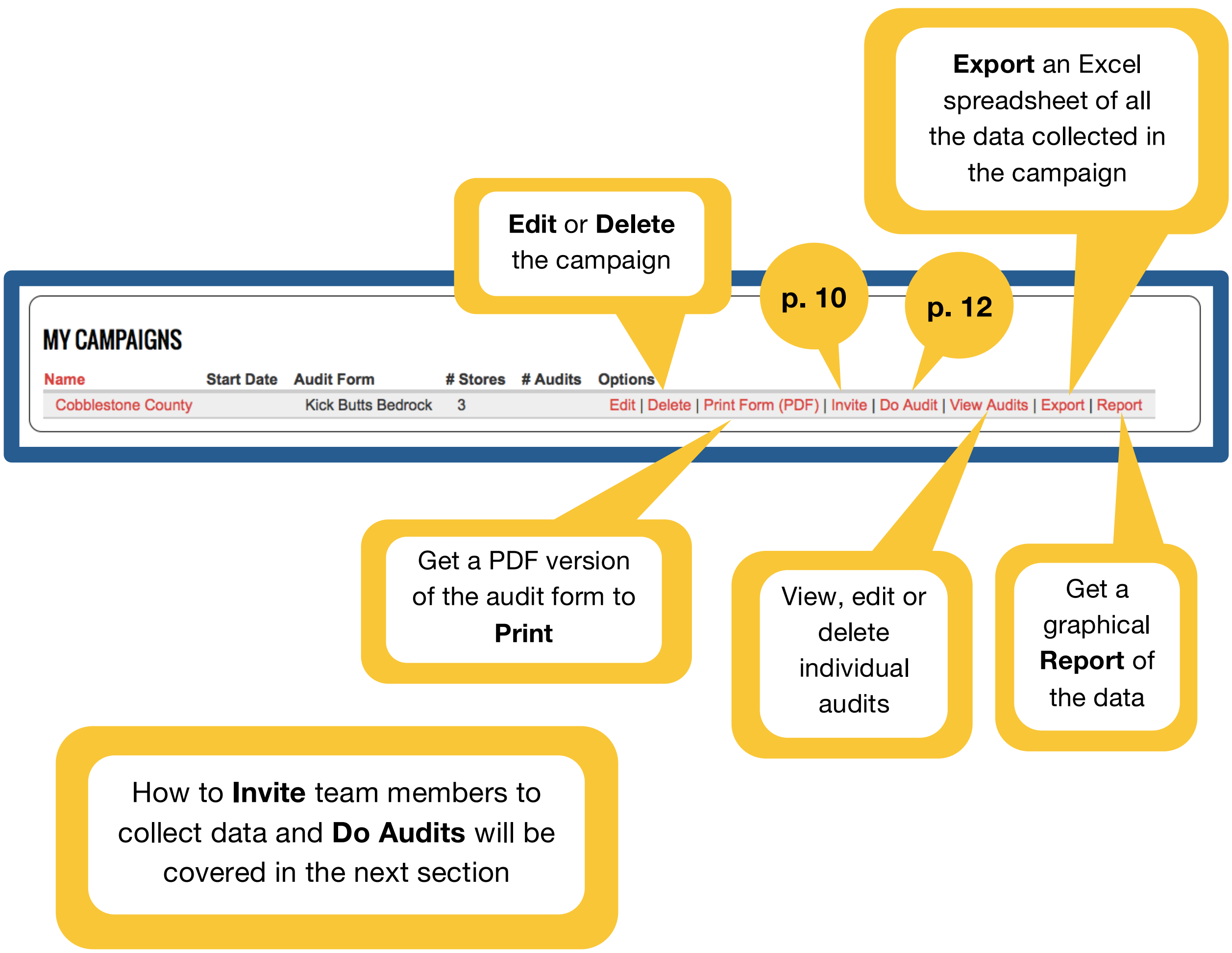
If you have a large number of stores and/or team members, you can narrow the list using the filter fields at the top of each column. If you enter text there, only those stores matching the text you entered will be displayed in the list. You can clear filters by deleting the text from the field or clicking the **Clear Filter** button. The list can also be sorted by clicking on any of the column names.

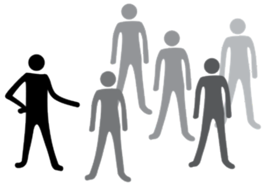





The **Current Store Assignments** section displays the current assignments for the campaign. You can sort the assignments by clicking on any of the column headings. To delete an assignment(s), check the box to the left of it and then click the **Delete Selected** button.

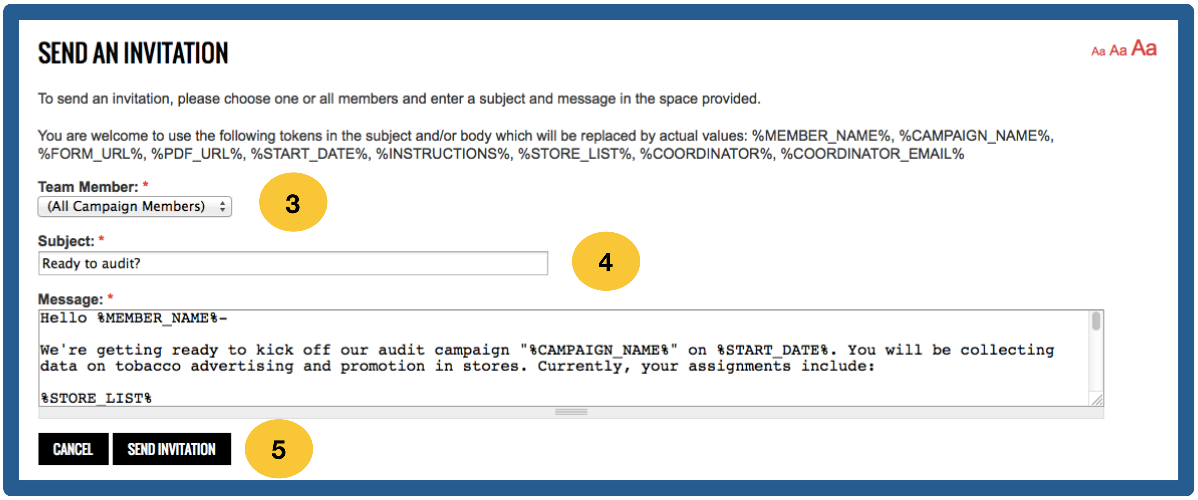
After your assignments have been made, return to the Campaign page. In the **My Campaigns** section, for each campaign you will be able to:





# Step #5: Collect Data

There are two ways to collect data using the Store Audit Center: on a mobile device in the field or on a paper audit form to be entered into the system at a later time. In order for a team member to begin collecting data, they must first be invited.

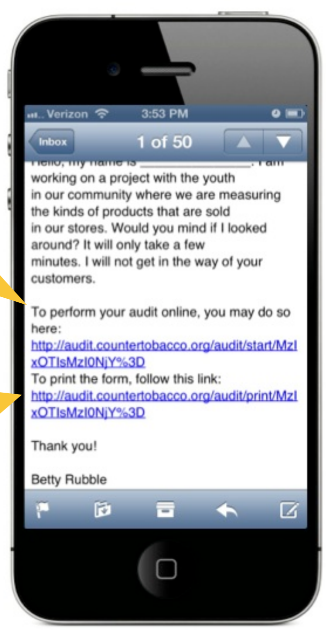



***To invite your team members to start an audit:***

1. Go to the Campaigns page in the black menu bar
2. Click the **Invite** link in the **My Campaigns** section
3. On the **Send an Invitation** page, using the **Team Member** drop-down menu, choose if you want to send invitation emails to all team members who have stores assigned to them or choose one team member to send an invitation to
4. If you wish, customize the subject and/or text of the email in the **Message** section; the message is already set to automatically fill in the names and campaign details
5. Click **Send Invitation** when you're done

Perform the audit directly in the web-based system

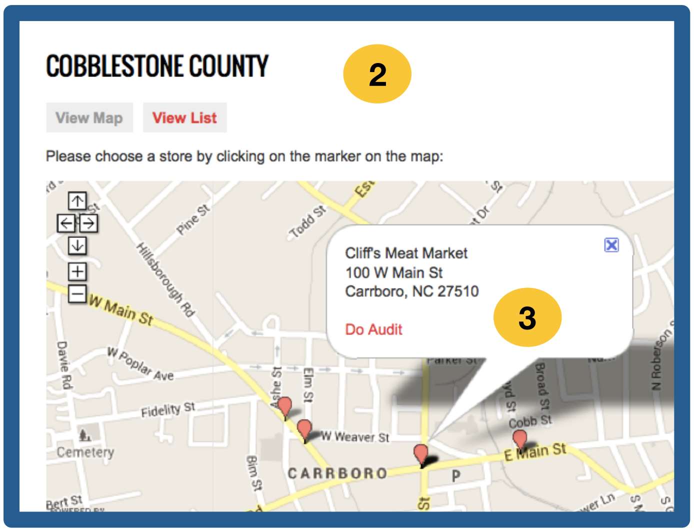
Print a PDF version of the audit form, collect the data on paper and enter the data later

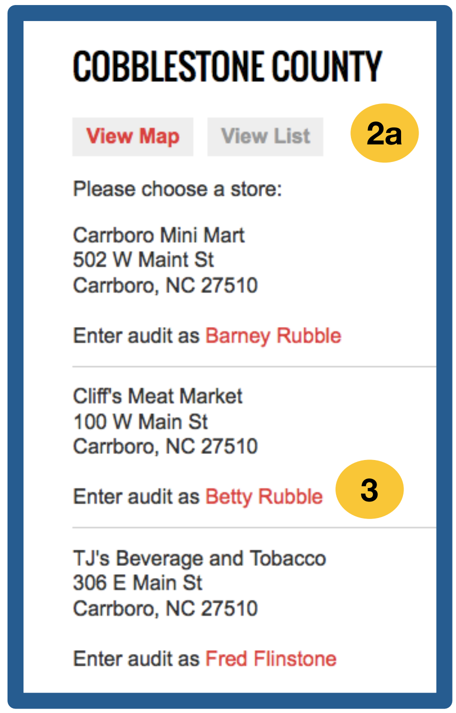


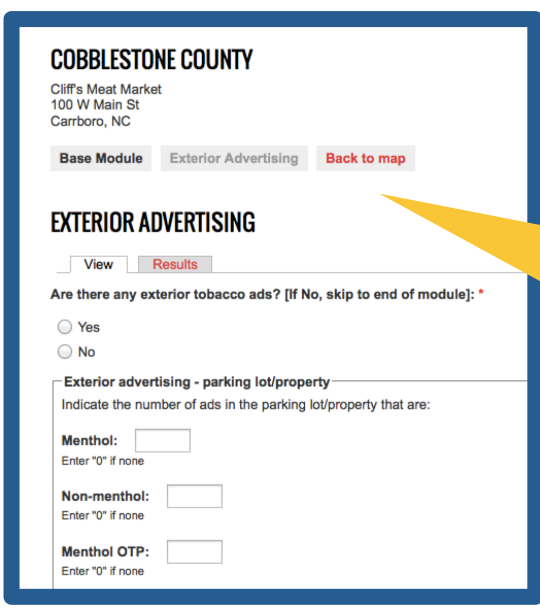

The team member(s) will receive an email with a list of stores with clickable links that will open in the mobile device's maps application. Additionally, the email will contain customized links that allow them to access the Store Audit Center to perform their audits, or get a printable audit form.

# *Mobile Data Collection*

1. Click on the link in the email to perform audits online
2. View a map with the stores to be audited and click on the individual map pins or
    a. Click **View List** link above the map to display the stores to be audited as a list, which can be helpful on mobile devices
3. Below the address of each store that's been assigned to a team member—and hasn't yet been audited—is a link with a team member's name; Click this link and start the audit for that store
4. Click **Save and Next** to move onto the next module
5. Click **Save and Done** when you have reached the end of the audit form

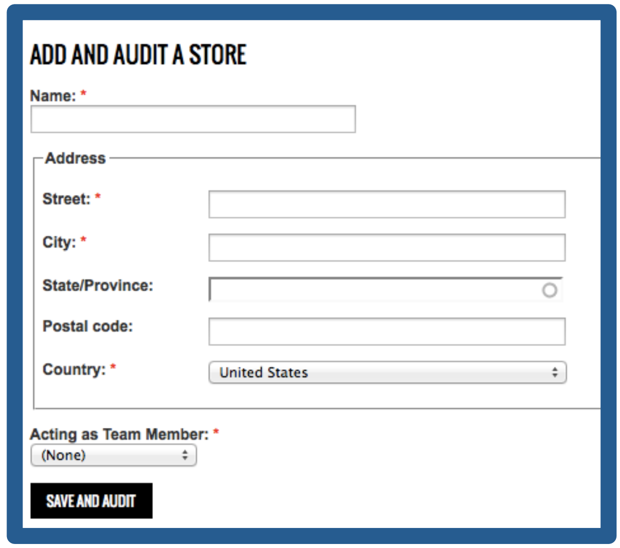



Each module in the audit form will be listed at the top; the **Save** button will be at the bottom of each module

If you selected the **Team Members may add stores** option when you set up the campaign (p. 7), the team member will see the **Add and Audit a Store** section at the bottom of the page. This allows the team member to input the information for a new store and select himself or herself as the auditor in the **Acting as Team Member** drop-down menu. By entering the store information and clicking **Save and Audit**, the team member will be taken straight to the audit form for the new store, and it will be added to the list of stores in your account.




After entering data for the store, the team member will be taken back to the audit selection page where they can choose or add a new store to audit if desired. After completing the audit, the link to enter the audit as that team member will disappear from the list and be replaced by the date and time it was audited.

## *Paper Data Collection*

To collect data using paper forms, team members can click on the email link to print the form. This will generate a PDF file of the campaign's audit form with the campaign name, start date and instructions, as well as blanks for entering the team member's name, the date and time of collection, and the name of the store being audited. The data from stores can be collected on paper using this form and then entered by the team member on a computer using the directions from the mobile data collection section above. Alternatively, the Coordinator can go to My Campaigns, print the forms and follow the steps below when entering the data:

1. Go to the **Campaigns** page in the black menu bar
2. Click on the **Do Audit** link to the right of the name of your campaign
3. Enter an audit by clicking the link with the assigned team member's name
    a. Use either the map or the list view
4. Enter data from the paper audit form for that particular store in the web-based form
5. After completing the audit, the link to enter the audit as that team member will then disappear from the list and be replaced by the date and time it was audited.

If the paper data you're entering is from a store that isn't already in your campaign, click the **Do Audit** link as above and enter the store name and address into the **Add and Audit a Store** section at the bottom of the page. Choose the team member who completed the audit from the **Acting as Team Member** drop-down menu, and click the **Save and Audit** button to enter the audit.

# Uploading Photos

Photo by Kathryn Stein

If your audit form module contains fields for uploading photos, the interface for uploading will depend on the device you're using.

***If you're using an iOS device, like an iPhone or iPad:***

1. Tap the **Choose File** button
2. Choose either to take a new photo or choose one from your photo library

***If you're on a PC or Mac:***

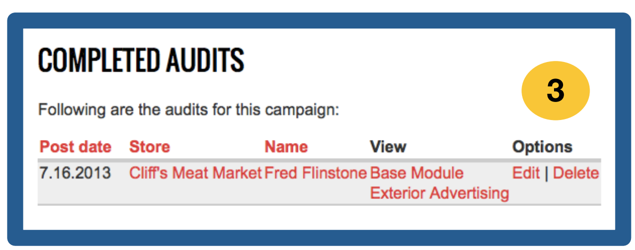
1. Click the **Choose** File button to browse for the image file you want to upload
2. Once you've selected the photo, its name or a picture of it will appear next to the **Choose File** button
3. When you complete the audit form and save the data, the photo will be uploaded and become part of the data for that specific audit

# Managing Your Team's Data Collection

***Editing a completed audit:***

1. Go to the **Campaigns** page using the black menu bar
2. Click the **View Audits** link to the right of the campaign containing the audit
3. On the **Completed Audits** page, click the **Edit** link to the right of the audit you want to edit
4. Edit any data
5. Click **Save and Next** to move through the modules
6. Click **Save and Done** when you get to the end; When you've submitted the changes, you'll see a confirmation message on the **Completed Audits** page

***Deleting a completed audit:***



COMPLETED AUDITS

3

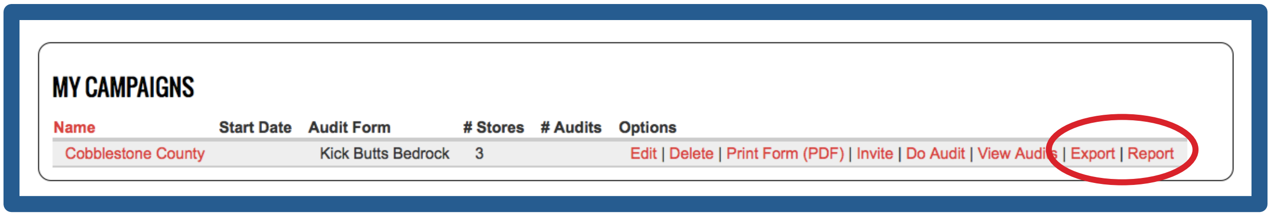
Following are the audits for this campaign:

| Post date | Store | Name | View | Options |
|---|---|---|---|---|
| 7.16.2013 | Cliff's Meat Market | Fred Flinstone | Base Module<br>Exterior Advertising | Edit \| Delete |

1. Go to the **Campaigns** page
2. Click the **View Audits** link to the right of the campaign containing the audit
3. On the **Completed Audits** page, click the **Delete** link to the right of the audit you want to delete
4. You'll get a message asking you to confirm that you want to delete the audit; Click **Delete**, and you'll see a confirmation message on the **Completed Audits** page

# Step #6: Get A Report

***To get a report on a campaign:***



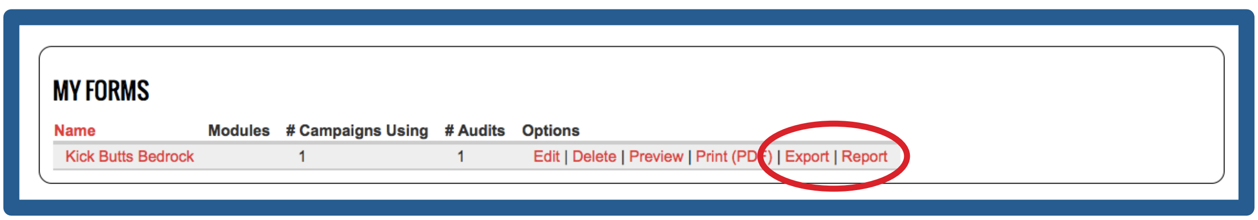
**MY CAMPAIGNS**

| Name | Start Date | Audit Form | # Stores | # Audits | Options |
|---|---|---|---|---|---|
| Cobblestone County | | Kick Butts Bedrock | 3 | | Edit \| Delete \| Print Form (PDF) \| Invite \| Do Audit \| View Audits \| Export \| Report |

To get a graphical data report for one of your campaigns, go to the **Campaigns** page using the black menu bar and click the **Report** link farthest to the right of the campaign. This will give you a web-based version of the report that's great for viewing on screen and will allow you to save chart images for presentations or other uses (right-clicking on the chart and save image). There will be a **Generate PDF** link at the top of the report that will give you a PDF version that's great for printing or sharing.

To download an Excel spreadsheet showing all audit data for a particular campaign, click the **Export** link to the right of the campaign.

***To get a report on an audit form:***



**MY FORMS**

| Name | Modules | # Campaigns Using | # Audits | Options |
|---|---|---|---|---|
| Kick Butts Bedrock | | 1 | 1 | Edit \| Delete \| Preview \| Print (PDF) \| Export \| Report |

To get a graphical report for a particular audit form—which will display data for all audits completed by Store Audit Center users using that audit form—go to the **Audit Forms** page in the black menu bar and click the **Report** link farthest to the right of the audit form. Similar to a campaign report, this will give you a web-based version of the report that's great for viewing on screen and will allow you to save chart images for presentations or other uses. There will be a **Generate PDF** link at the top of the report that will give you a PDF version that's great for printing or sharing.

To download an Excel spreadsheet for an audit form, click the **Export** link to the right of the audit form.

COUNTER TOOLS

205 Lloyd St. #211
Carrboro, NC 27510
www.countertools.org
(919) 593-5822

Last Update: October 2013